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Structure, Concentration and Changes of the Media System in the Southern Cone of Latin America

Estructura, concentración y transformaciones en los medios del Cono Sur latinoamericano

ABSTRACT
The present text analyzes the changes in the structure of the media system in four South American countries during the first decade of the 21st century: Argentina, Brazil, Chile and Uruguay. The general premise is that the current levels of concentration in media markets have accelerated during the first decade of the 21st century as a consequence of the historical processes which have taken place in these countries, although each has different origins and effects in each of these national cases. Increased concentration, the media convergence with telecommunications and the Internet, the growing financial dependence of the sector, the foreign acquisition of a significant amount of their property at the hands of multinational firms and the crisis of the current regulatory frameworks are the main frameworks for understanding the transformation of the media in the Southern Cone of Latin America. The processes of change identified to describe and analyze the evolution of Brazilian, Argentine, Chilean and Uruguayan media in recent years could not have been achieved without the collaboration of different governments and the radical transformations in the management and ownership patterns of these media.

RESUMEN
El presente texto analiza los cambios en la estructura del sistema de medios de comunicación en cuatro países de América del Sur durante la primera década del siglo XXI: Argentina, Brasil, Chile y Uruguay. La premisa general es que los niveles actuales de concentración en los mercados los medios de comunicación se incrementaron durante la última década, como consecuencia de los procesos históricos que han tenido lugar en estos países, aunque cada uno tiene diferentes orígenes y efectos. La profundización del proceso de concentración, la convergencia de los medios con las telecomunicaciones e Internet, la creciente dependencia financiera del sector, la adquisición extranjera de una cantidad importante de sus bienes a manos de las empresas multinacionales y la crisis de los marcos reglamentarios actuales son los principales marcos para la comprensión de la transformación de los medios de comunicación en el Cono Sur de América Latina. Los procesos de cambio identificados en el análisis de la evolución de Argentina, Brasil, Argentina, Chile y Uruguay en los últimos años no se habrían podido lograr sin la colaboración de los diferentes gobiernos y sin radicales transformaciones en la gestión y la propiedad de los medios de comunicación.

KEYWORDS / PALABRAS CLAVE
Media system, telecommunications, concentration, pluralism, convergence.
Sistema de medios, telecomunicaciones, concentración, pluralismo, convergencia.

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1. Introduction

Studying the ownership structure of Latin American media is a challenge in various senses. On the one hand, this is because it is not risky to state that the region has one of the highest ownership concentration indexes in the world. On the other hand, because although there are many studies that have tried to analyze the issue of media during the past 40 years (from the classic studies of the 1970s to more recent works published in English, such as Sinclair (1999), Fox and Waisbord (2002) or in Spanish by Mastrini and Becerra (2006), Becerra and Mastrini (2009) and Trejo Delarbre (2010), to name a few), for the most part these have been studies on a national level or a compilation of studies from national capitals, which do not always follow a common research methodology.

In a previous study (Mastrini & Becerra 2001), we tried to analyze the transformation of large communications groups in the region from family businesses (in the 1950s and 1960s) to large conglomerates (from the last few years of the 20th century), whose logic for merging is not so much based on political power as in the past, but on the exercise of dominant positions in the market. In that study, we analyzed the strategies of the four largest media groups in the region: Globo (Brazil), Televisa (Mexico), Clarin (Argentina), and Cisneros (Venezuela). In prior studies, we made progress in the measurement of levels of ownership concentration of media, considering that any theory put forward concerning the consequences of concentration must be based on a study of the real structure of the media system (Mastrini & Becerra 2006; Becerra & Mastrini 2009).

This article aims at analyzing the changing media structure in the countries that comprise the Latin American Southern Cone, with particular interest in verifying trends related to ownership concentration. Special concern will be given to the strategies of telecommunications companies, who in the past few years have maintained a constant shift towards the sector of communications media.

A new situation in Latin America during the 21st century is that the public sector has assumed a stronger regulatory position with regards to historical processes, where there was a marked combination of interests between media owners and political power. On the one hand, this is due to the emergence of center-left governments or populist inprint in many countries of the region (Brazil, Chile, Bolivia, Ecuador, Venezuela, Nicaragua, Uruguay and partially Argentina), which have shown interest in establishing new regulatory frameworks. On the other hand, technological developments such as digitalization have stimulated a convergence of sectors, even muddying the traditional barriers that have separated telecommunications from audiovisual media (primarily, radio and television).

In the meanwhile, the large communications groups readjust within their new environment. Internally, these groups are completing a process of transformation that has entailed changing over from family businesses to multimedia conglomerates. Some of these groups have taken advantage of globalization, diversifying their interests in other companies (especially Televisa, Cisneros and Globo). On the other hand, the groups must respond to challenges posed both by the political sectors that are trying to redefine their regulatory framework and corporate strategies of telephone companies that have become real competition as a result of technological convergence and integration of services (such as triple play). In this sense, the large multimedia groups of Latin America face the challenges posed by the emerging global regulatory system, using its high capacity for influencing national governments despite contradictions that arise due to the change in the nature of state intervention that new Latin American governments propose.

2. Concentration and diversity

The phenomenon of concentration of media ownership has been discussed in the past few years from different theoretical perspectives that have gone beyond the traditional studies on the political economy of communications from a critical perspective. This latter trend has historically attempted to establish to what degree communications media ownership relations form part of a system that is trying to justify existing social stratification relations (Murdock & Golding, 1974).

Incidentally, and especially after the controversy that was unleashed as a result of an attempt by the U.S. Federal Communications Commission (FCC) to make anti-concentration standards more relaxed in 2003, there has been an increasing number of academic studies that have tried to justify greater levels of concentration than those currently permitted (Thierer, 2005; Compaine, 2005).

The concentration of production of a sector or financial branch can be defined according to the impact of the largest companies of a specific economic activity on the value of production of said activity (Miguel de Bustos, 2003). Concentration is a complex process, multi-faceted and with multiple variables, since it can mean the domination or control of one company on the market (through takeovers and mergers), the territorial coverage by one or just a few media companies, and political origins. Through processes of media system concentration, the economic forces that operate on these markets tend to generate imperfections and asymmetry. The technical debate on the relationship between these processes and their possible consequences for pluralism, diversity, informative balance and innovation in the production of cultural goods remains open.

Albarran and Dimmick (1996) justify the importance of the study of this concentration, when they observe that «by evaluating the level of concentration within a certain market, you can learn about the market structure, which at the same time has consequences for the types of products offered, the degree of diversity or differentiation of products, the costs for consumers and the entry barriers to new competitors».

In Latin America, dynamic and internationalized market share often leads companies to the crossroads of either growing through the takeover of smaller companies, or being bought out by international groups. In this way, the growing number of mergers and company takeovers in the information-communications sector has implied that the traditional company structure has become a group structure.

In this sense, the large multimedia groups of Latin America face the challenges posed by the emerging global regulatory system, using its high capacity for influencing national governments despite contradictions that arise due to the change in the nature of state intervention that new Latin American governments propose.

3. Media in the Southern Cone

In Latin America, radio broadcasting was entrusted at an early time to the private sector which then developed a competitive model based on publicity for financial support and sustainment. Both radio and television have shown a strong trend towards centralizing their contents in large urban centers. In the case of open signal television, for many years it showed high dependence on North American content. However, since 1990 it has shown a greater capacity to generate national content; even in the area of fiction, prime time has been taken over by national productions (with the partial exception of Uruguay in the Southern Cone, where the small size of the market makes it difficult to match up to basic economies of scale). Foreign content continues to predominate on cable television, with numerous Hollywood movie and television series channels.

In an analysis of Latin American television, Sinclair (1999: 77) highlights that its ownership and control is structured around families with strong patriarchal figures. This model has experienced changes in the last few years due to the internationalization of audiovisual markets and the generational turnover that has fallen upon the main communications groups: «The descendents of the patriarchs retake family control over the groups, while applying new forms of administration. The past national champions are being reconverted into important actors in the globalized world» (Mastrini & Becerrra, 2001). There is also media that has transformed its offer. As pointed out by Bustamante and Miguel (2005:13), «originating from and focused on the world of distribution and broadcasting, they have learned to take charge of important national production veins in areas of high local demand (like television fiction), but have abandoned or weakly cultivated markets that are more greatly dominated by large groups such as film or discography, where they have practiced a policy of generating alliances with international groups».

Fox (1990) characterizes the Latin American model as a «politically docile commercial system». From the 1990s, the predominance of neo-liberal policies even promoted greater deregulation of the communications system. The processes of ownership concentration, favored by more relaxed rules, did not take long to appear. By allowing cross-ownership in markets that were already concentrated, they promoted the formation of large media conglomerates. This situation holds especially true in those countries with larger markets such as Brazil and Argentina.

During the first decade of the 21st century, there has been resurgence in the region of different governments that have revised, at least on a discursive level, the postulates of neo-liberalism. The policies based on the proposals of the Washington Consensus are being abandoned, and a new agenda is emerging. Within this new agenda, communications media holds an important place. Some governments propose changes in media policies that suggest a greater degree of State intervention in regulation and certain relative controls of levels of ownership concentration. At the same time, civil society groups are encouraged to participate in the discussion of policies such as media ownership.

In response to this, large media owners have denounced that government regulation is trying to limit their critical capacity. This line of argument has been very similar in all countries for decades, highlighting its refusal to accept any modification to the legal system, especially with regards to the possibility of allowing access to new social actors into the media market. The conniving practices among media owners and political power as described by Fox do not apply to the past few years in Latin American countries, where many times television channels, radio stations and news-papers appear as political opposition leaders against democratically elected governments. Below we will present an overview of the media structure in the countries of the Southern Cone.

3.1. Argentina

The definition of communications policies in Argentina presents an apparent paradox: strong state intervention and the absence of a state policy to promote public interest. It is not difficult to prove that the state has had decisive influence on the radio broadcasting sector (defining licenses, providing subsidies, sanctioning the legal framework, etc.) and that, at the same time, it has failed to sustain public policy over time.

The structure of the media system has been based on private radio broadcasting that dominates the stations of the main cities throughout the country. It is accompanied by radio broadcasting that is state/-government-run, which only covers the city of Buenos Aires and several zones with low demographic density, while the large urban centers have been beyond their reach.

Until the 1980s, the media structure, both the press and the audiovisual sector, showed no cases of cross-ownership. More recently in the 1990s, with the progress of neo-liberal policies executed by the government of Carlos Menem, modifications were made to the legal framework, which allowed for the creation of multimedia groups. From that moment, the process of media ownership concentration has remained constant. The Clarin group is the main communications group in the country, with the best-selling news-paper (and partner of several others in Argentine provinces), one of the most important television channels in Buenos Aires as well as several others in the provinces, a chain of radio stations, the main cable distribution system and several cable channels. It also participates in other areas tied to cultural industries such as press paper manufacturing (where it is a partner to the state), film producers, news agencies and Internet distribution. The great threat to the dominant position of the Clarin group are telephone companies (especially Telefonica from Spain) that share the domination of the landline tele-phone business and are the main operators in the cell phone market and broadband distribution (Internet). In addition to Telefonica and Telecom (tied to Telecom from Italy, and therefore to Telefonica from Spain), there is a growing importance of the Mexican company, Telmex. Both Telefonica and Telmex have shown interest in entering the business of cable television, an issue that is currently prohibited by the current regulatory framework. The annual turnover of

Concentration is a complex, multiple and diverse process. The media is made up of institutions with double action and mediation of interests: political and economic. Based on the type of products they offer – which have a double value: material and symbolic – they constitute a particular actor and have special consequences for their actions. They participate, affect and constitute (although they do not exclusively determine) the public arena, which is a political arena.

these companies greatly exceeds that of the Clarin group.

Since 2008, there has been a heavy confrontation between the government and the large communications groups, lead by the Clarin group. The primary motivation behind this confrontation has been the sanctioning of a new law on audiovisual communications services in 2009 that proposed new limits for the concentration of media ownership.

3.2. Brazil

Brazil constitutes the largest market in Latin America. Its over 180 million inhabitants give its cultural industries an unmatched potential for development. Although it is calculated that a third of the population live in extremely precarious conditions, the cultural consumption of Brazil in absolute terms noticeably exceeds that of any other country in the region.

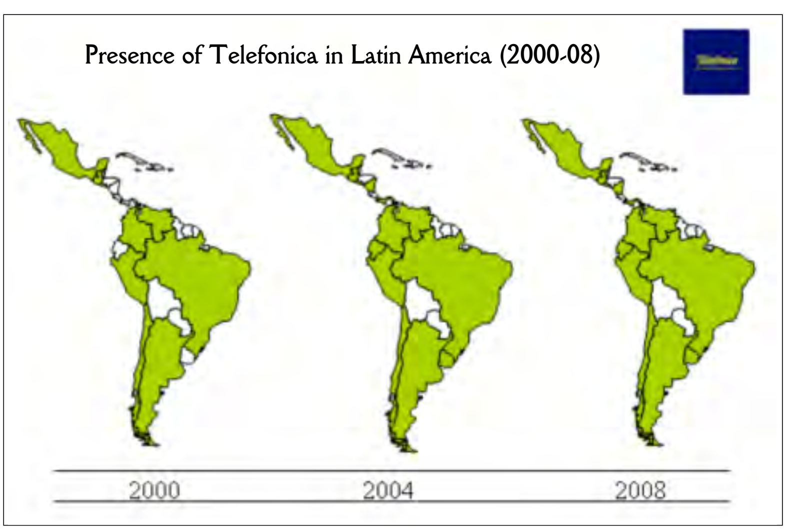
More than 500 newspapers are published in Brazil; the majority is regional, given that there is practically no press with national coverage. The focus of media in large urban centers (San Pablo, Rio de Janeiro, Salvador) is also repeated in the case of radio and television, although in this case the situation is made worse by the chaining of contents. Although the ownership structure is divided among the big cities, the contents are very similar throughout the country.

Within the Brazilian media structure, the presence of the Globo group stands out, with its origins in the 1960s, when the Marinho family holding led by the O Globo newspaper began to show presence in the television market. As Fox (1990: 72) points out, TV Globo was born with the dictatorship established in 1964, serving as support for its conservative modernization project. With contributions from the North American investments of the Time Life group, Globo was able to displace its main competitors and begin to expand towards national coverage. Its growth was made possible by taking advantage of numerous State investments to develop telecommunications through the Empresa Brasileña de Telecomunicaciones (Brazilian Telecommunications Company). The group was able to generate a product of original nature: soap operas. With these, it not only took advantage of its horizontal and vertical integration, but soap operas became the raw material with which Globo would face its entry into the international market. During the government of President Lula (2002-2010), the Globo group used all of its lobbying capacity to get the Brazilian state to lean towards the Japanese standard of digital television, instead of the European standard that telecommunications companies promoted. The Globo group holds ownership of the second highest selling newspaper in Brazil, the main television station which has relay stations throughout almost the entire country, and the largest cable television company which it holds in association with Televisa from Mexico. The Globo group has shown concern for the expansion of tele-phone companies (Possebon, 2007: 302).

The government of Lula has been very moderate in the development of media policies – in fact, for a long time the Minister of Communications was journalist Helio Costas, tied to the Globo chain. The main government policy was driven by public radio broadcasting with the creation of the Empresa Brasileña de Comunicación (EBC, Brazilian Communica-tions Company) that, however, was never fully carried out.

3.3. Chile

This country exhibits the most stable economic environment during the last two decades in the region. Chile exhibits the only «successful» case of neo-liberal policies in the continent, although it may also be maintained that its situation is precisely due to the fact that orthodox policies were not

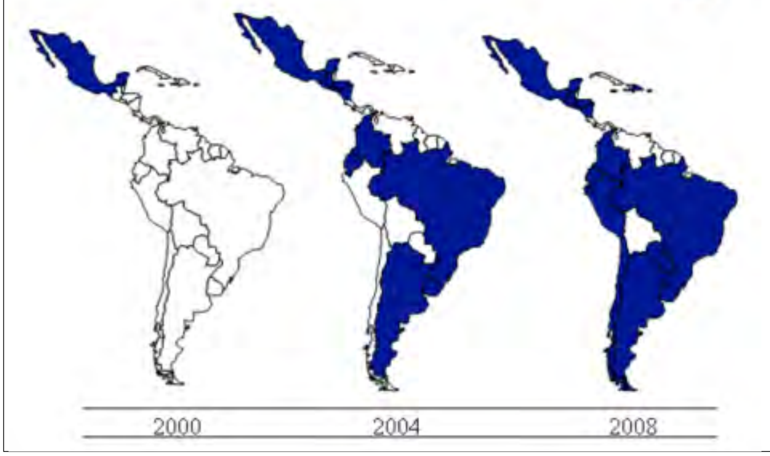


Source: own analysis based on the balance statements of the company.

rigorously applied at least since the recovery of the constitutional regime in 1990 (part of the structural reforms were carried out during the dictatorship of Augusto Pinochet, fundamentally in the 1980s). During the most recent years, and until March 2010, the last two presidents belonged to the Chilean Socialist Party.

Regarding cultural industries, Chile has one of the least regulated markets in the region. There are no great legal impediments for the concentration of media ownership or for the participation of foreign investors in the information-communications sector. Until the 1970s, the ownership structure of the communications media, especially the press, was tied to political trends. Likewise, television channels were in the hands of the state and universities. The dictatorship of Augusto Pinochet (1973-1990) entailed ideological control over communications media, censorship and the closure of many of these channels, as well as the formation of a duopoly composed of the Mercurio group (Edwards family) and the COPESA group (La Tercera).

Presence of Telmex in Latin America (2000-08)



Source: own analysis based on the balance statements of the company.

Coinciding with the return to democracy, since the early years of the 1990s there has been a process of liberalization and privatization of the information-communications sector. From then, the heavy concentration that existed in the Chilean press has begun to expand to other sectors. However, it should be noted that multimedia conglomerates as large as those in Argentina and Brazil have not been formed. There is also an important participation of foreign capital in the radio broadcasting sector.

Communications policies in Chile have been defined by a central market orientation that has not put limits on either the concentration or inflow of foreign capital. The policy of the Coalition of Parties for Democracy (Concertación, the center-left coalition of political parties in Chile) has been explicit towards state-run television, which has managed to exceed private media in ratings.

3.4. Uruguay

Uruguay was considered for many years as the Switzerland of South America. In fact, in addition to having a banking system renowned for maintaining banking secrecy, the socio-demographic indexes of Uruguay were close to those of many European countries. The media system has heavy penetration in Uruguayan society, but the small size of its market (the country has less than four million inhabitants) prevents large-scale economic development. It is highly dependent on the content produced in neighboring countries: Argentina and Brazil.

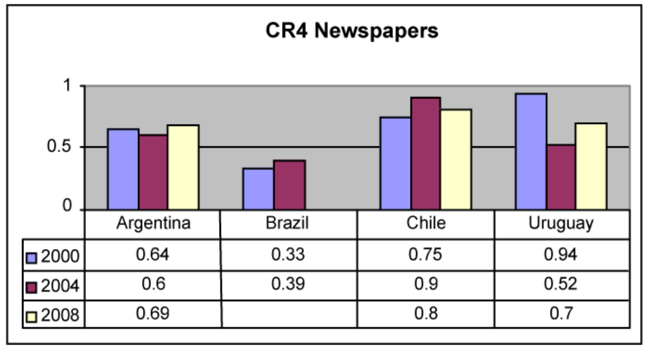
Communications media is highly concentrated in Uruguay, but there are not any observable large groups of communication. Both in the press and in the audiovisual sector, three groups share the market. Even cable television has been developed as a joint business between the three main companies. It is important to note that it is the only country in the region that has a monopoly over basic telephone services, as well as an important role for the state mobile communications company.

The government of the Broad Front (Frente Amplio), a center-left political party that came to power for the first time in 2005, did not have a communications policy that affected the interests of the commercial sector. However, community radio broadcasting legislation, thought to be one of the most advanced policies in the world, was passed in 2008.

4. Concentration in the Southern Cone

Here we will present results from an analysis of the concentration of communications media and telecommunications ownership in the countries of the Southern Cone, based on the application of the concentration index method (CR4) in two senses: one that weighs the volume of turnover of the four largest companies in relation to the rest (CR4-turnover), and another that measures the percen-tage of domination of the audience (CR4-audience). In this article, data is limited to CR4-turnover, given that the data corresponding to audiences has not yet been processed. Although the research project studies all communications markets (press, radio, paid television, basic and mobile telephone services, Internet, see Becerra and Mastrini (2009)), this article only presents data corresponding to three markets: the daily press, television and mobile telephones. In this way, some examples are provided from the editorial, audiovisual and telecommunications sectors.

Market Concentration of Newspapers



	Argentina	Brazil	Chile	Uruguay
2000	0.64	0.33	0.75	0.94
2004	0.6	0.39	0.9	0.52
2008	0.69		0.8	0.7

Data in millions of dollars. Source: own research.

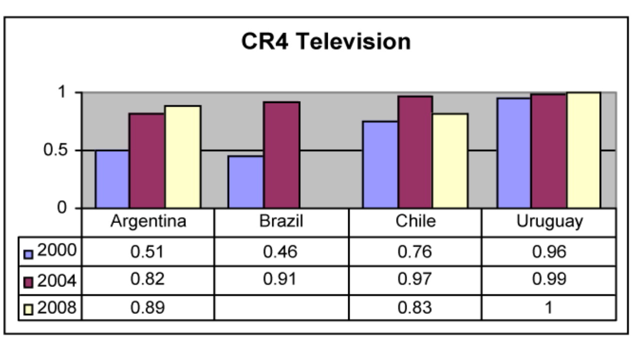
Levels of market concentration in the written press vary according to country. While in Brazil the joint income of the four largest newspapers reached 40% of the total, in Argentina they exceeded 60%, and in Chile and Uruguay they showed even higher indicators. The data presented here tends to confirm previous studies that linked diversity in the editorial market with the size of the market. Only with a high number of readers can a newspaper reach the economies of scale needed to survive financially. It should be remembered that the Brazilian population is three times the combined population of Argentina, Chile and Uruguay.

In the television market there is also a high concentration of turnover. According to the data collected (see Figure 2) this market takes the form of an oligopoly. In all of the countries in the Southern Cone, the four largest television channels of each country control at least 50% of all income in the sector, which confirms that there are high levels of concentration. Also in this case, Brazil has a lower concentration index to those of its neighboring countries. It is important to highlight that although the number of licenses existing in each of the countries varies (more than 300 in Brazil, less than 50 in Argentina) the levels of concentration are high in both cases. This would indicate that those to reach dominating positions at the audience level also manage to capture the greatest market share. As opposed to the written press sector, the data collected allows us to establish that there is a trend towards slight increases in the levels of television market concentration in the Southern Cone.

The mobile telephone market is even more concentrated. In all of the countries in the Southern Cone, the CR4 reached the highest possible level. In fact, it is interesting to observe that with the policies of liberalization that entailed dismantling public telecommunications monopolies that existed until the 1990s, in just a few years the market managed to take on the form of a strong oligopoly (in some cases a duopoly), but privately owned. Even the telephone market, which was born within a «competitive» regulation environment, does not allow for more than four operators. This situation is also the case in Brazil, which showed an indicator of low concentration at the beginning of the century, followed by a trend of competitor withdrawal.

The extremely high levels of concentration in the mobile telephone market merit a deeper reading. As indicated by Fox and Waisbord (2002: 9), «the privatization and liberalization of the telecommunications industry also contributed to the formation of conglomerates. It is impossible to analyze the evolution and structure of contemporary media without considering the developments made in the tele-communications market». To this regard, two companies have launched campaigns to

Market Concentration of Television



	Argentina	Brazil	Chile	Uruguay
2000	0.51	0.46	0.76	0.96
2004	0.82	0.91	0.97	0.99
2008	0.89		0.83	1

Data in millions of dollars. Source: own research.

conquer the Latin American market. In fact, since the beginning of the 21st century, Telefonica of Spain and the Mexican company Telmex have carried out a regional dispute for regional leadership of the telecommunications market. The Telefonica group has had a significant presence in the majority of Latin American countries since the sector began to be privatized in the 1990s. The Telmex group, which obtained control of Mexican telecommunications, came into the game much later than its rival (see Figure 6, at the end of the article). However, it has gained ground and, in 2008, exceeded Telefonica in its volume of regional turnover.

The economic importance of these large communications groups stands out when their turnover volume is compared to that of communications media. Figure 4 shows the turnover volume of Telefonica and Telmex, contrasted with the total turnover of the press sectors in the countries studied. This shows that during the year 2008, Telefonica turnover in Latin America was ten times greater than that generated by all of the newspapers in Argentina, Brazil, Chile and Uruguay combined, six times higher than that of paid television, and three times higher than that of open signal television.

When added together, Telefonica and Telmex had a regional turnover of 73 billion dollars, a figure that greatly exceeds the 21 billion dollars of turnover from the press, open signal television and paid television combined in the four countries studied.

Although it could be argued that Latin America for telephone companies and the Southern Cone for the communications media sector are two geographically different dimensions, what is being gauged here is the enormous difference in availability of capital for the former. It is important to remember that telephone companies design their business strategy at the regional level, and their policies and development are coordinated at this level.

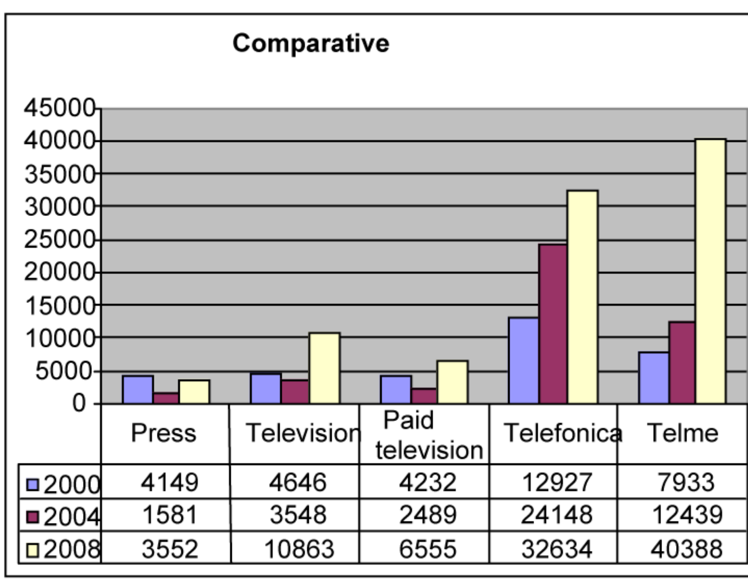
In the last few years, Telmex and Telefonica have begun to expand towards the cable television sector, taking advantage of the benefits of digital convergence. Although this topic is beyond the scope of the present study, the data presented in Figure is highly relevant, especially for the current owners of paid television systems in the Southern Cone, currently in the hands of local companies.

It is important to also consider that telephone companies are actors that follow a globalized market logic and participate from their different scales (McChesney,1998). The protagonists of the process of formation of a global commercial market are public and private, but they go beyond the frameworks traditionally defined by the state.

5. Conclusion

Concentration is a complex, multiple and diverse process. The media is made up of institutions with double action and mediation of interests: political and economic. Based on the type of products they offer –which have a double value: material and symbolic– they constitute a particular actor and have special consequences for their actions. They participate, affect and constitute (although they do not exclusively determine) the public arena, which is a political arena. And as economic actors, and according to the type of activity they carry out, they tend towards concentration, due to the composition of costs, in which fixed costs are very high and variables are very low. They organize their activities according to this format, leading to processes of concentration that can

Comparative Turnover: Media Sectors vs. Telephone Companies



	Press	Televisión	Paid television	Telefonica	Telme
2000	4149	4646	4232	12927	7933
2004	1581	3548	2489	24148	12439
2008	3552	10863	6555	32634	40388

Data in millions of dollars. Source: own data.

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generate entrance barriers for other actors. To govern this trend and prevent its impact on the loss of cultural diversity, numerous states have been trying to actively intervene for over a century in the control of anti-competitive practices and in the stimulation of a presence of various stations, channels and newspapers with different editorial perspectives.

With regards to the Latin American situation, Bustamante and Miguel (2005: 13) indicate that, «concentration in Latin American countries, benefited and spawned by political interference, in the absence of public counterweight to these interferences, has created a structure that poses serious questions in terms of public pluralism in their respective countries, with times in which the politicians have shown an unbearable prepotency».

According to Albarran and Dimmick (1996), it is considered that concentration exists and is high when more than 50% of the market is controlled by the top four operators. As seen in this study on countries in the Southern Cone of Latin America, in all cases (with the exception of the written press in Brazil) the indicators of concentration are higher than the percentage considered as high by Albarran and Dimmick.

It was also expressed that the theoretical debate about the relationship between these processes and their possible consequences for pluralism, diversity, informative balance and innovation in the production of cultural goods remains open.

Finally, a third aspect to consider is the progressive integration of dominant logic and actors from the communications sector of the Southern Cone with respect to those that lead the world market, a process that knows no immediate limits. It should be highlighted that, as an inherent trait of this process, the breaking down of borders, both geographical and industrial, poses an objective organization that is global and converging of changes. In the Southern Cone, the great challenge for media, and especially for its societies, is to coordinate with the demands of a globalized world, without the extremely high concentration produced in the information-communications sector boring through its enormous cultural diversity.

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